

Superior Court of California

County of Merced

Probate Department

Probate Notes

Probate Notes for future calendars are available from the time they are created until the morning of the scheduled hearing. Updates to the Probate Examiner's Notes typically will be posted 3 days prior to the hearing. If you are filing documents to cure a technical defect, documents should be filed a minimum of 2 court days prior to the hearing. Documents filed late will not be reviewed except on the date of the hearing at the Judge's discretion and could result in a continuance of your case.

Parties intending to appear in Court regarding their hearing must notify all other parties and call (209) 725-4240 to notify the Court of such intent by 4:00 pm on the day before the hearing.

Contacting the Probate Examiner:

Probate Examiner's email address is: probate.examiner@mercedcourt.org

Emails must have the case identification information and hearing date/time in the subject line. No attachments will be opened. The Probate Examiner can only respond to inquiries regarding the meaning of comments in the Notes. Please do not email to notify that documents have been filed, to request a confirmation whether documents have been received or to request the clearing of notes. No legal or procedural advice may be given by the Examiner in response to your email.

Questions regarding fees, forms or status of orders should be directed to the Probate Unit of the Clerk's Office at (209) 725-4111 between the hours of 8:00 a.m. – 12:00 pm. and 1:00 p.m. – 3:00 p.m., Monday – Friday.

Superior Court of California, County of Merced
PROBATE CALENDAR
HONORABLE: Brian McCabe

DATE: Thursday, October 8, 2020
TIME: 8:15 AM Courtroom 10

PROBATE CALENDAR

The following tentative rulings shall become the ruling of the court unless a party gives notice of intention to appear as follows:

1. You must call (209) 725-4240 to notify the court of your intent to appear.
2. You must give notice to all other parties before 4:00 p.m. of your intent to object.

Per California Rules of Court, rule 3.1308(a)(1), failure to do both items 1 and 2 will result in no oral argument. **To limit the spread of the COVID-19 virus, the court will only conduct remote hearings. Parties who contest the tentative ruling or wish to appear remotely at a hearing must contact the clerk of the Court at (209) 725-4111 to provide their contact information for the remote hearing.**

CASE#: 20PR-00239

CASE NAME: Estate of Herbert Dwayne Bumgardner

THIS CASE IS SET FOR HEARING ON:

Spousal Property Petition

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Referenced Interspousal Transfer Grant Deed is not attached.

TENTATIVE RULING:

Appearance required.

(continued on next page)

CASE#: 20PR-00240

CASE NAME: Estate of Guenter Luettgens

THIS CASE IS SET FOR HEARING ON:

Petition for Administration with Full IAEA Authority

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

None.

RECOMMENDATIONS:

Recommend approval.

CASE#: P18179

CASE NAME: In the Matter of Loretta Rocha Testamentary Trusts A &B

THIS CASE IS SET FOR HEARING ON:

Continued from August 31, 2020 re: Petition for Approval of Sixth Account and Report of Trustee for the Period of January 1, 2017 to December 31, 2018; inclusive; Waiver of Trustee Fees; and Petition for Order Settling Account and Approving Attorney Fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS WERE NOTED AT THE PREVIOUS HEARING:

1. Disbursements for Accounting and Legal Fees (Schedule F) contain the same amounts charged to the Trust accounting as both "Income" and Principal".
2. Attorney Fees requested are significantly higher than previous accountings and there is no explanation as to the significant increase in fees. Attorney Fees requested in this accounting are \$10,056.00. The attorney fees requested in the previous two accountings are \$2,889.00 (4th accounting) and \$2,855.00 (3rd accounting). Each accounting period for the last three accountings have each been for a period of 12 months.

RECOMMENDATIONS:

Appearance required.